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27 April 1966

MEMORANDUM FOR: Executive Officer, DD/S&T

**SUBJECT : Preparation of a DD/S&T R&D Project
Officer's Manual**

The scope of DD/S&T contractual actions and the number of people involved have reached the point where specific and uniform guidance is needed for the Project Officers who are responsible for the conduct of R&D contracts. This manual should include material on the following items:

Requirements for R&D

This section should spell out the guidance which is available to Project Officers on the needs for R&D, both as expressed by various customers and as developed within the Directorate. The relationship of requirements to the R&D planning cycle should be explained. Specific instructions should be given as to the level at which an authoritative statement of a requirement can be obtained.

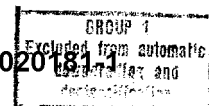
Relationships and Contacts

The rules involved in intra-Agency, inter-Agency, and industrial contact with regard to obtaining technical information and investigating the availability of assistance or participation on the part of any other organizations in the conduct of R&D should be clearly stated. The limitations on contact, what constitutes legitimate requests, and the borders between these items and explicit or implicit requests for proposal, should be clearly delineated.

Basic Proposal Content

Instruction to the Project Officers on what constitutes minimum content for an acceptable proposal whether solicited or unsolicited

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is required. It is anticipated that handouts for use with industrial organizations may be developed to clarify this section further. This section should also spell out the relationship of the proposal to the type of information which the Project Officer will be expected to provide in having a contract negotiated. It may also contain cautionary advice against having the proposal disclose any past, present, or anticipated operational activities, and similar sensitive information.

Contract Processing

Source Selection

This will be a very important part of the Handbook for the Project Officer. It should stress avoidance of favoritism, the use of the Office of Logistics and technical officers in determining possible sources for the contracts, the criteria for making a sole source selection versus a competitive bid, etc.

Request for Proposal

Guidelines for the content of request for proposals as well as guidelines for the personal conduct of the Project Officers should be spelled out in this important section. The legal ramifications of briefing and debriefing should be cited. An explanation of the cost of proposals to industrial organizations and the allowance of costs for these proposals should be provided.

Evaluation

This section should spell out acceptable evaluation procedures for DD/S&T, including the selection of Office of Logistics personnel, consultants, or people from other offices of the Directorate, or other Directorates to participate in evaluation. The requirement for setting up the weighting factors to be used in proposal evaluation in advance of evaluation, and the required documentation should be described.

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Contract Approval Request

This should be consistent with DD/S&T letter 1591-66 of 21 March 1966.

Relations with the Office of Logistics

This section should detail the relative roles of the Project Officer and the representatives of the Office of Logistics in selecting contractors in requesting RFP's, in the negotiation of contracts, and in other related areas.

Contract Negotiation

Basic Content

This section should provide guidance as to the minimum content which is acceptable in a contract; it should include all of the DD/S&T "boilerplate" items as well as the reasons for these items.

Participation

This section should explain the prerogatives, the responsibilities, and the authorities of the Project Officer when working with the Office of Logistics in the negotiation of a contract.

Contract Monitoring

The responsibilities, duties, and authorities of the Project Monitor should be specifically defined for various types of contracts. A discussion of the ramifications of change of scope, or modification of contract should be included here along with the procedures for having these modifications made. Particular emphasis should be given to the matter of overruns. This should define the Agency's position with regard to overruns and a discussion of the actions of the Project Officer which may contribute to overruns. The ADP procedures which apply to contract monitoring should be described.

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Contract of Performance Evaluation

This section should establish formal procedures for the uniform evaluation of all contractors by the Project Officer.

Reports or Deliverable Items

The duties and responsibilities of the Project Officer for inspecting and certifying that material produced under contract is acceptable should be clearly defined. Methods by which the Project Officer may obtain assistance in the form of consultants, design review boards, etc., if needed, should be discussed.

Administration

The ADP Contract Form

This section should explain the use of the form and include definitions for the various terms that may be used therein, such as applied research, advanced development, and the breakdown of technical areas such as optics, electronics, etc.

Contract Files

This section should describe how uniform files will be maintained, the required content of these files, how they are closed out, etc.

Security

The procedures and uses of both personal cover and Agency cover as it may be involved in contractual work should be defined. Guidance as to when cover should be used, and on what kind of contracts, should be given.

Conflicts of Interest

I anticipate that every new Project Officer would certify that he had read and understood this manual prior to being designated

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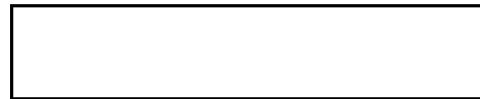
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as a Project Officer, and that all Project Officers would be required to recertify on an annual basis in order to insure that the DD/S&T procedures and contract administration remain current and uniform.

I would like very much to have this manual available to the Project Monitors by 1 June 1966 together with whatever sections may be available and complete at that time.

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cc: DD/S&T



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